CHAPTER 2

The data arrives.

And it's a mess.

Theory —	Contact records · Data types · Lifecycle stages · Quality failures
Demo —	Your HubSpot import — live faults, live fixes, live lists
SAASpocalypse —	Salesforce valuation, AI tools, what to actually learn for jobs
Workshop —	Your import · Data quality audit · IF/THEN deliverable

The 5 components — today: 1 + 2

Every automation flow depends on all five. None of them can work if the one before it is broken.

1 — Data In

Forms, imports, integrations. Every contact record starts here.

TODAY

2 — Contacts

One unified record per person. The object everything else acts on.

TODAY

3 — Segments

Lists that define who receives what. Today's homework output.

4 — Outreach

Emails, tasks, notifications. The action the rule fires.

5 — Reporting

CAC, LTV, conversion rates. The proof the system works.

Sessions 03–05 cover components 3–5. Today's data quality work determines whether all of those will function correctly.

THE END-OF-TERM PROJECT

Build a real marketing automation stack.

One real brand. 12 sessions. One deployable system.

S02–03: CRM Foundation

Clean contact database · Lifecycle stages · 3+ segments · Custom properties

Tool: HubSpot Free

Part 1 TODAY

S04–05: Email Campaigns

2 real campaigns sent · A/B test design · Analytics screenshotted 48h after send

Tool: HubSpot Free

S06: Automation Blueprint

Paper blueprint of 3 automation flows · IF/THEN rules · Maturity level annotated

Tool: Paper + Make/n8n schema

S07–09: KPI Dashboard

Tableau dashboard: funnel metrics, CAC estimate, LTV model, source comparison

Tool: Tableau (educator seats)

S10–11: Retention Strategy

Written retention plan · 3 automation rules · Churn risk model · Budget ask

Tool: HubSpot + any free tool

S12: Final Presentation

CFO pitch deck · Live HubSpot demo · Tableau dashboard · Q&A from class

Tool: All tools

FINAL GRADE

Assessment: 40% TP (weekly deliverables) · 40% PROJ (final presentation + system) · 20% CC (class participation).

Why automation exists — and what it actually does

Efficiency

234 hours of manual CRM work per employee eliminated. Rules run 24/7 without a human deciding each time.

ROI

Every rule either saves time (operational ROI) or increases revenue — triggered emails convert 3–4× better than broadcast.

Personalisation

The right message to the right person at the right moment — without manually segmenting or writing each email.

Customer Insights

Automated capture reveals patterns: which segments engage, which churn, which source converts fastest.

Scale

One rule covers 10 contacts or 100,000. The cost of a triggered email to 50K contacts equals sending it to 5.

The three operational roles automation plays

Customer behaviour analysis

Every contact action — email opens, page visits, purchases, support tickets — is logged automatically. Builds a behavioural profile that manual tracking cannot replicate at scale.

IF contact visits pricing page 3× in 7 days → flag as high-intent → notify sales rep

Workflow streamlining

Routine decisions — assigning leads, sending follow-ups, updating lifecycle stages, moving deals — are replaced by deterministic rules that execute instantly and consistently.

IF lead replies to outreach → move to MQL → assign to rep → create deal

Cross-channel alignment

Sales, marketing, and customer success all see the same contact record. Email campaign + sales call + support ticket all update one timeline — no more 'left hand / right hand' problem.

Nurture email + BDR call + support ticket → all visible on one unified contact record

Automation isn't a feature. It's the architecture that connects these five benefits — and lets one person do the work of five, consistently, at any scale.

MCQ

CRM language — terms you will use on every job

These are the words your future managers, clients, and tools will use. Understand them precisely.

MQL

Marketing Qualified Lead

A contact marketing has scored as likely to buy — based on content downloads, page visits, email opens, or lead score.

CRM: Lifecycle Stage = MQL

SQL

Sales Qualified Lead

A contact sales has accepted after a discovery call — meets BANT criteria (Budget, Authority, Need, Timeline). The marketing-to-sales handoff.

CRM: Lifecycle Stage = SQL

CUSTOMER JOURNEY

From first awareness to loyal customer

Every touchpoint: ad → content → email → MQL → SQL → demo → customer → re-purchase → referral. Each stage transition can trigger automation.

CRM: Tracked via Lifecycle Stage progression + activity timeline on the contact record.

DEAL

A revenue opportunity

A HubSpot object representing one sales opportunity. Linked to a contact with a value, stage, and close date. One contact can have multiple deals.

CRM: Sales → Deals (Kanban pipeline). Created at SQL. Stage changes trigger tasks and notifications.

SALES CYCLE

First contact → closed deal

Average duration of the full sales process. B2C: days. B2B SMB: weeks. B2B enterprise: months. Automation compresses it by eliminating wait time between stages.

CRM: Reported from Deal creation to Close date. Shorter cycles = better upstream qualification.

TIME TO CLOSE

Deal creation → Closed-Won

The per-deal KPI version of sales cycle. A 21-day average can hide 90-day outliers. Automation prevents deals going stale between actions.

CRM: Tracked on Deal record. IF no deal activity in 48h → alert rep. Classic L3 deals automation.

MQL → SQL is the marketing-to-sales handoff. The Deal tracks the revenue opportunity. The Sales Cycle and Time to Close measure how fast it moves. All of this lives in the CRM.

234

hours a year

spent on manual CRM tasks per marketing employee

Where the 234 hours go

38%

Manual updates

Manually updating contact records after each interaction

24%

Copy-pasting data

Copy-pasting data between spreadsheets and CRM

21%

Chasing colleagues

Chasing colleagues for missing contact information

17%

Fixing errors

Fixing import errors and duplicate records

A correctly configured automation system eliminates **all four categories**. The rules run. The record updates. The task assigns. Zero human hours.

> The first 60 minutes of today exist to make those 234 hours possible. Bad data makes every one of those rules fire incorrectly.

What a contact record actually IS

Not a row in a spreadsheet. A structured object that automation rules can read, write, and trigger on.

Identity	Name, Email, Phone	Required for outreach. Email is the CRM's unique identifier — no email, no record.
Firmographic	Company, Job Title, City	Defines who the person is professionally. Enables B2B segmentation.
Transactional	Last Purchase Date, Spend	What they've bought and when. Enables re-purchase and retention rules.
Behavioural	Email opens, page visits	What they do, not who they are. The trigger source for L4 automation.
Lifecycle	Lifecycle Stage	Where they are in the relationship. The permission layer for outreach.

Our dirty CSV contains all five types — and has quality faults in four of them. We're about to see each one break in HubSpot.

Lifecycle stages — the permission layer

The stage defines what you're allowed to say and how. It is not a marketing label — it is a routing rule.

Subscriber	Opted in to hear from you. No further qualification.	**IF joins list → send welcome sequence**
Lead	Showed interest. Not yet scored or qualified.	**IF no activity in 14d → send re-engagement**
MQL	Marketing-qualified. Meets scoring threshold.	**IF becomes MQL → assign to sales rep**
SQL	Sales-qualified. Sales team has accepted the lead.	**IF becomes SQL → trigger demo outreach**
Customer	Has purchased. Relationship is active.	**IF first purchase → send post-purchase sequence**
Evangelist	Repeat buyer, referrer. Highest-value segment.	**IF referred a contact → trigger reward flow**

'Dormant' is NOT a HubSpot lifecycle stage. When you see it in a CSV — or see 'mql' in lowercase — HubSpot rejects it. That's what you're about to watch happen.

4 failure modes — all 8 faults in today's CSV map to one of these

1 Inconsistent values

MQL vs 'marketing qualified lead' vs mql · FRANCE vs France vs fr

Impact: Segment filters return wrong counts. Rules fire for some contacts and silently skip others.

2 Missing required fields

Clément Picard: no email address · Antoine Moreau: no lifecycle stage

Impact: HubSpot requires email as primary key. No email = no record, no automation, no outreach. €15K spend, completely unreachable.

3 Duplicate records

Sébastien Blanc appears twice with s.blanc vs S.Blanc email casing

Impact: Two records for one person. Any MQL rule fires twice — two identical emails to the same inbox.

4 Invalid format

22-04-2024 · 14 March 2024 · JULIE RENARD in all caps

Impact: Date-based triggers break. Personalisation tokens shout at your contacts.

Data normalisation (MCQ Q9) means eliminating all four categories before the data enters the CRM — not after.

What just happened — mapped to automation

Fault: MQL / SalesQualifiedLead / mql

Rule broken: IF Lifecycle Stage = Marketing Qualified Lead → assign to sales rep

5 contacts never entered the MQL segment. They received no sales follow-up. Invisible miss.

Fault: Clément Picard — no email

Rule broken: IF Lifecycle Stage = Sales Qualified Lead → send demo invitation email

€15,000 annual spend. No email on record. No rule can reach him. He is a ghost in your CRM.

Fault: 22-04-2024 / 14 March 2024

Rule broken: IF Last Purchase Date > 90 days ago → send re-engagement email

Two contacts with unparseable dates were silently excluded. The rule never fired for them.

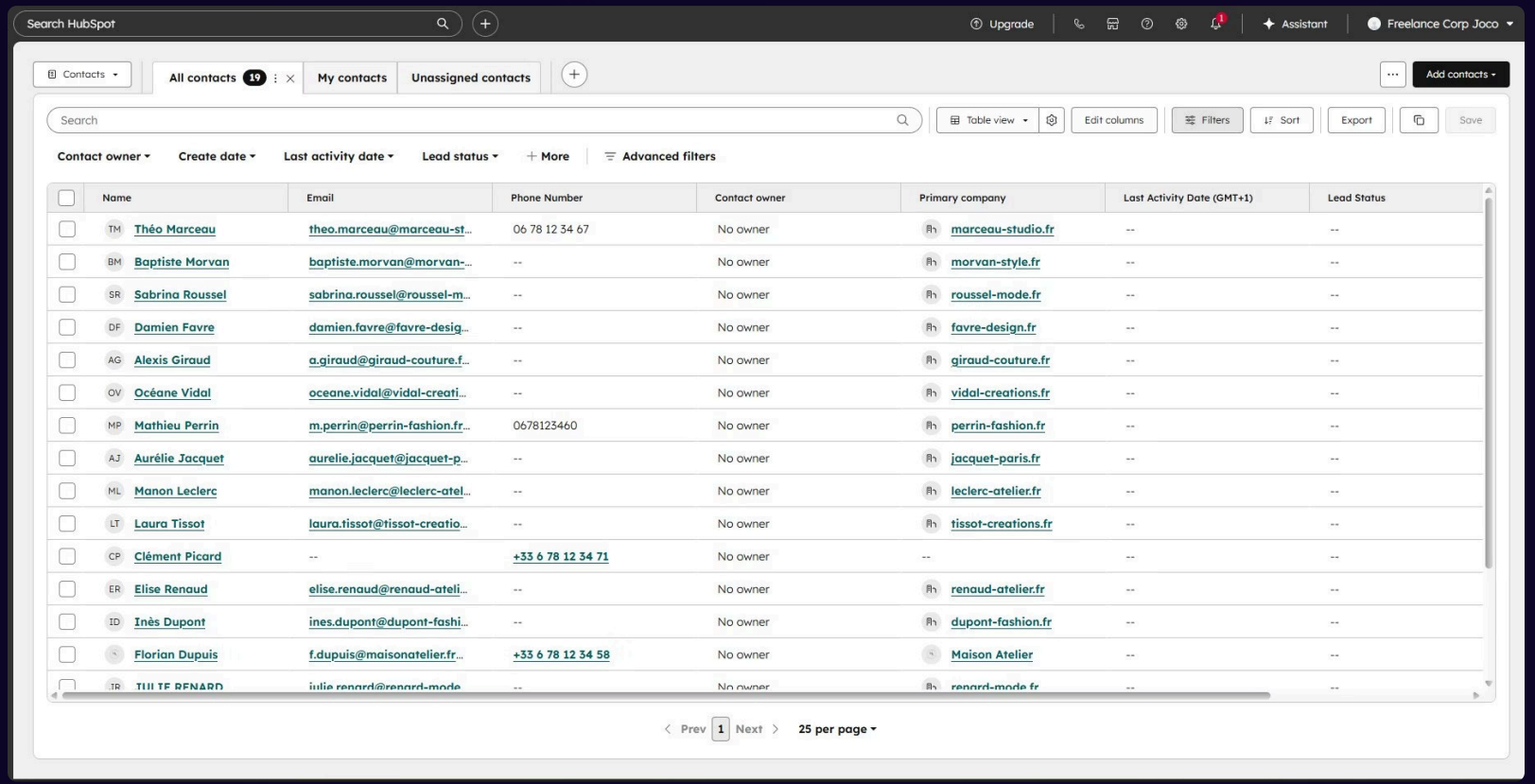
Fault: Duplicate Sébastien Blanc

Rule broken: IF Lifecycle Stage = MQL → enrol in nurture sequence

Same person enrolled twice. Two identical emails. Nurture sequence destroys its own credibility.

A dirty CRM doesn't produce wrong automation. It produces no automation — silently, at scale, for your highest-value contacts.

19 contacts. Clean. Every rule can now run.



Note: Clément Picard's email column shows blank — his record exists, but outreach rules cannot reach him. €15,000 in spend. Unreachable. Find the email before Session 03.

From contacts to audiences — static lists

19 clean contacts. Now we tell HubSpot how to group them. A segment is a permission to act.

Static list

A snapshot. Contacts are added manually or via import. It does not change automatically.

Use when:
One-off campaigns · Fixed cohorts · Import records you want to preserve as-is

Trap: Using a static list where you need an active one — new contacts never appear.

Active list (Smart list)

Filters run continuously. Contacts enter and exit automatically as they meet or stop meeting the criteria.

Use when:
Ongoing automation triggers · Lifecycle-based segments · Any audience that should evolve over time

Trap: HubSpot Free gives you both — but Active lists are periodically gated behind paid tiers. Design logic first.

Demo lists built in your account: RetailCo — Customers (Demo) · 6 contacts RetailCo — High Value (Demo) · 5 contacts

SAASpocalypse

Why the tools you've been told to learn may not exist in 5 years — and what to learn instead.

$CRM — what the P/E number hides

> "Something to consider with $CRM: their TTM stock-based compensation is $3 billion — more than Vermont's entire state general fund budget. Their diluted SBC per share is $3.2. Compare this to their Non-GAAP TTM EPS of $6.89. Their real Non-GAAP EPS should be $3.89 per share. When you see a P/E of 35× on a major finance site, you are being shown an artificially low number. The true cost of your investment is almost double that advertised rate."

$3B

Annual SBC

More than Vermont's state budget

$3.2

Diluted SBC / share

The hidden per-share cost

$6.89

Reported Non-GAAP EPS

The number finance sites quote

$3.89

True Non-GAAP EPS

After SBC is properly deducted

35×

Advertised P/E

Looks reasonable

~60×

True P/E

Based on real earnings per share

The tools most likely to replace workflow builders by 2027

We use HubSpot Free because it teaches the architecture. But the architecture transfers. These are the tools it transfers to.

Clay — Free tier

Data enrichment + automation

AI-powered contact research. Builds prospect lists by querying LinkedIn, Clearbit, Apollo simultaneously. Replaces hours of manual CRM data entry. Used by best-in-class outbound sales teams.

Make (n8n) — Free / open source

Visual workflow automation

Replaces HubSpot's paid workflow builder. Drag-and-drop IF/THEN logic across any app. n8n is self-hosted and unlimited. Make has a generous free tier. Both require you to understand the architecture first.

Apollo.io — Free tier

Outreach sequencing

Email + LinkedIn multichannel sequences with AI personalisation. The 'send the right email at the right time' problem, productised. Directly competes with HubSpot's paid sequences.

Claude / GPT — Free tiers

AI-native automation logic

The IF/THEN rules you write on paper in Session 06 can be executed directly by an LLM via API — reading a CRM record, deciding what to send, writing the email, sending it. No workflow builder required.

Instantly — Trial

Cold email infrastructure

Manages sending domains, warm-up, deliverability at scale. What HubSpot can't do on the free tier (limited sends, branding) Instantly does — at volume, with better deliverability infrastructure.

Notion / Airtable — Free tiers

Lightweight CRM

Used by early-stage companies as CRM before they need HubSpot. Teaches the same contact-record + list logic in a more flexible environment. Extremely common in startups and agencies.

None of these tools matter if you can't design the logic. The architecture first, the button second — that principle makes you tool-agnostic.

What to actually learn — the 2025 stack

Non-negotiable

- HubSpot Free proficiency — still the most common SMB CRM. Certifications are worth doing.
- Excel / Google Sheets fluency — data lives in spreadsheets before it reaches CRMs. Always.
- IF/THEN logic literacy — the architecture this course teaches. Transfers to every tool.

High leverage

- Make or n8n — visual automation without a paid CRM tier. Hire-able skill in agencies and startups.
- Clay — the tool most rapidly replacing manual CRM enrichment in B2B sales teams.
- Prompt engineering for automation — writing Claude/GPT prompts that execute CRM logic via API.

Strong differentiator

- Salesforce certification (Admin or Marketing Cloud) — still required in enterprise job specs.
- SQL basics — being able to query a CRM database directly makes you 10× more effective.
- Tableau Public proficiency — Sessions 08-09 of this course. Visual reporting is a standalone skill.

The goal of this course is tier 1. Everything else builds from it. A person who understands automation logic can pick up any new tool in a week.

Personalisation tokens — making one email feel like a thousand

Any contact property you've imported can become a merge field in an email. This is how 'Dear Customer' becomes 'Hi Manon'.

HubSpot token syntax in email body

{{contact.firstname}}	→ Manon	First Name (Text)
{{contact.city}}	→ Paris	City (Text)
{{contact.lifecyclestage}}	→ Customer	Lifecycle Stage (Radio)
{{contact.annual_spend}}	→ 6100	Annual Spend (Number)
{{contact.last_purchase_date}}	→ 2024-11-02	Last Purchase (Date)

What you can personalise — beyond just the name

Subject line

'Manon, your November picks are in'

Preview text

'Based on your last order in October...'

Greeting

'Hi Manon' vs 'Dear Customer'

CTA copy

'See your Paris store picks'

Offer tier

Conditional block: IF Spend > €5K THEN show VIP offer

Sender name

'Sophie from RetailCo' for high-value contacts

Every custom property you create in HubSpot is a potential personalisation token. This is why the Annual Spend and Last Purchase Date fields you built today matter — they unlock personalised campaigns in Sessions 04–05.

RetailCo's 12-session journey — L1 to L4

Every session adds one layer to the automation stack. Today is the foundation — nothing that follows works without it.

L1	Fully Manual	**S01**	Foundations — Maturity scale · IF/THEN intro · CFO pitch	**L1→L2**
L2	Basic Broadcast	**S02–03**	Data + Segments — Clean CRM · Custom props · Lifecycle · Segments	**L2**
L3	Integrated	**S04–05**	Email — Deliverability · Campaigns · A/B · Analytics	**L2→L3**
L4	Intelligent	**S06**	Blueprint — Paper automation design · 3 flows · triggers	**L3**
L5	Predictive	**S07–09**	KPIs + Tableau — CAC · LTV · Dashboard · Source comparison	**L3→L4**
		S10–11	Retention — Churn · Loyalty · Personalised offers · Budget	**L4**
		S12	Final — CFO pitch · Live demo · Tableau · Q&A	**L4**

RetailCo today: L1–2. No unified data, no segments, one monthly broadcast. Session 12 target: L4. Behaviour-triggered campaigns, live Tableau dashboard, CFO-ready retention strategy.

WORKSHOP · PROJECT PART 1: CRM FOUNDATION · 90 min

① IMPORT RETAILCO · 20 min

1 — Import

Contacts → Import → RetailCo_Clean_Contacts_v2.csv
Fix Lifecycle Stage errors and date format errors inline.

2 — Custom properties

Settings → Properties:
— Annual Spend (EUR) as Number
— Last Purchase Date as Date picker (NOT text)
Report to map both.

3 — Build 2 lists

Customers (Lifecycle Stage = Customer)
High Value (Annual Spend > €5,000)
Confirm contact counts.

4 — The ghost

Open Clément Picard. Email: blank. Spend: €15,000.
This record exists in the CRM but no email rule can reach him.

② YOUR BRAND'S CRM · 40 min

Pick a brand you'll use through Session 12.

1 — Contact schema

What 5–8 properties does your brand need beyond name + email? Think about what filter condition each one enables.

2 — Create properties

Settings → Properties. Choose field types deliberately — Number, Date picker, Dropdown. Each type enables different rules.

3 — 15 contacts

Build a realistic CSV. Mix of lifecycle stages and spend levels. Import it. No deliberate errors — just realistic data.

4 — 2 segments

One single-condition, one AND/OR. Name them for what they enable, not what they are.

③ DATA QUALITY AUDIT BRIEF · 30 min

Provided: RetailCo_Dirty_Contacts_v2.csv + Audit Brief worksheet (distributed now)

1 — Q1 — Identify

Find all 8 data faults. For each: record the row, the column, and which of the 4 failure modes it belongs to.

2 — Q2 — Consequence

For each fault: write the automation rule it would break. Full IF/THEN format. Self-check applied.

3 — Q3 — Fix

For each fault: write the corrected value. If unfixable (missing data), explain what capture method you'd use.

4 — Q4 — Prioritise

Rank the 8 faults 1–8 by business impact. Justify your #1. Is it Clément Picard? If not, make the case.

For Session 03 · Homework = Project Part 1 continued

What you built today

- RetailCo: 19 clean contacts in HubSpot with correct lifecycle stages and custom properties
- Your brand: contact schema defined, custom properties created, first contacts imported
- 2 segments for each database (RetailCo + your brand)
- Understanding of why Clément Picard's missing email makes €15K in spend invisible to automation

Homework — due Session 03

1. Expand your brand dataset to 20+ contacts

Add more realistic variety: different lifecycle stages, a duplicate, a missing email, at least one contact with no lifecycle stage set. Make your own dirty-data problem.

2. Fix your dirty data

Import the messy version to a test account (or make note of what would break). Then import the clean version. Document the 3 most dangerous faults you found in your own dataset and what rule each one would break.

3. Build 3 segments

At least one uses AND logic. At least one uses OR. Screenshot each one with the filter criteria and contact count visible.

4. Write one IF/THEN rule per segment

Format: IF contact enters '[segment name]', THEN [specific action]. Run the self-check. Bring your 3 rules on paper to Session 03 — you'll pitch them in the first 10 minutes.

The brand you pick today is the brand you present in Session 12. Pick one you'd be proud to show in a job interview.